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2010 Health Care Workforce Trends in Missouri

Throughout the recent recession, many industries have shown their susceptibility to economic changes. One industry that has continued to grow in spite of the lagging economy has been Health Care.

The need for health care occupations is only expected to intensify due to aging populations and the reclassification of health care support occupations' responsibilities. As the oldest baby-boomers are nearing 70 years of age, they will be requiring more medical attention which will facilitate faster growth and a larger workforce. According to Census Bureau estimates for 2009, over 42% of Missouri's population are 45 years or older. As this demographic continues to expand, so will the need for more health care facilities.

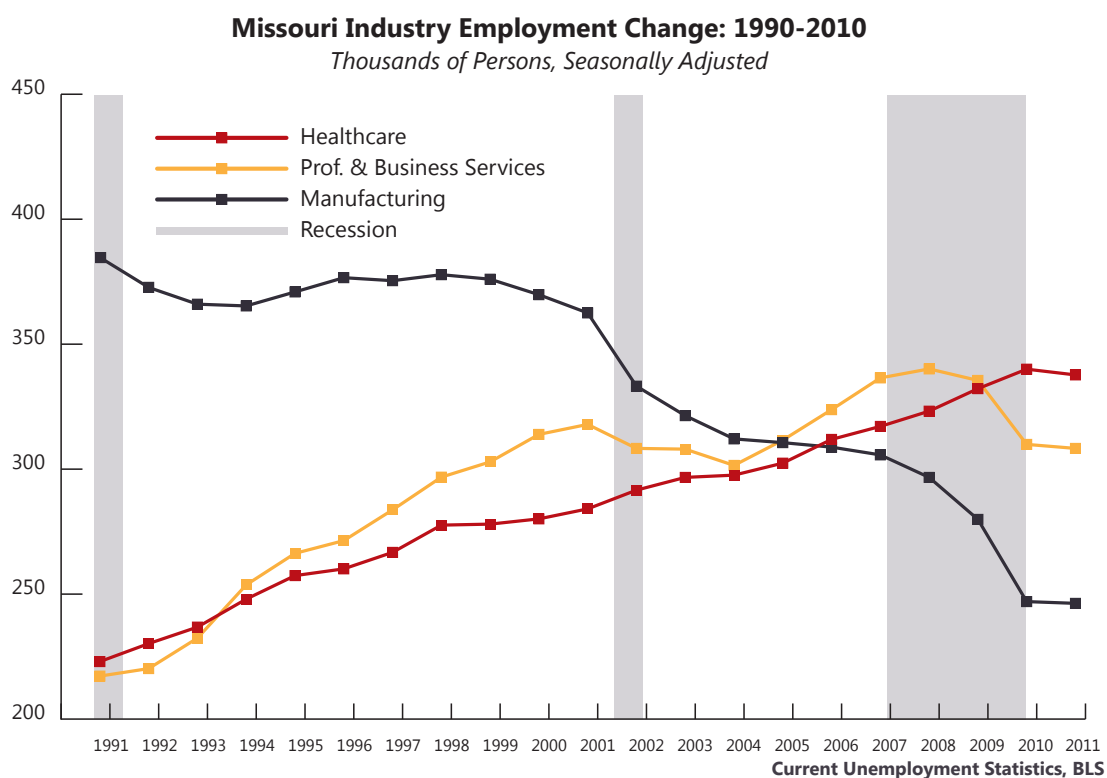
Missouri, like the rest of the U.S., has seen more and more of the patient responsibilities fall from their primary care physicians to health care support staff. Hospitals, trying to deal with cost effectiveness, are assigning more responsibilities to support staff than to higher salaried physicians. Therefore, health care facilities are forced to hire more support staff to deal with patient needs while the number of trained health care support personnel continues to lag behind industry demand.

Missouri's Health Care Industry Growth

Industry Growth

Like the U.S., Missouri is shifting from a goods-producing to a service-producing economy. This trend is evident when comparing historical industry employment in Manufacturing versus Health Care and Professional & Business Services.

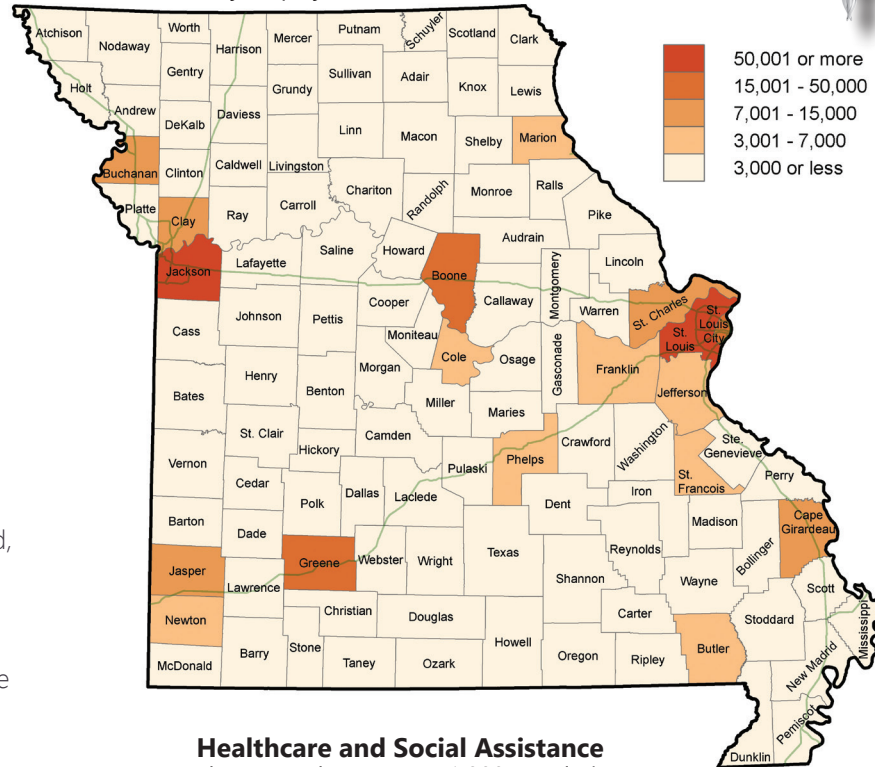
As demonstrated in the chart, Manufacturing and even Professional & Business Services are negatively affected by harsh economic climates such as the current environment. However, the Health Care industry has shown consistent growth throughout the recessions of 2001 and 2008, and now exceeds both manufacturing and business services in total employment.





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Healthcare and Social Assistance Industry Employment



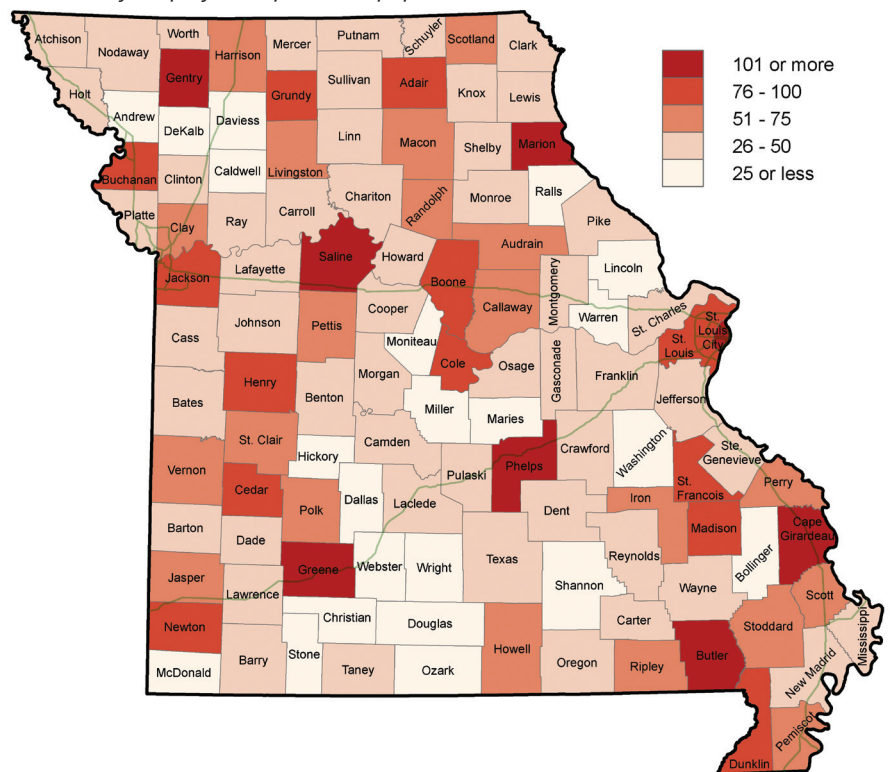
Industry Jobs

With over 338,000 jobs, the Health Care and Social Assistance Industry employs nearly 13 percent of Missouri's non-farm workforce. As the employment map shows, most health care jobs are located in the large population centers of St. Louis, Kansas City, Springfield, and Columbia. However, when measuring employment per 1,000 in population, the bottom map highlights areas of the state that may be underserved.

Target Industry

State leaders know that health care and related health innovations are important to Missouri's long-term economic prosperity. In Missouri's new economic development strategic plan, Health Services and Sciences are an identified target cluster that recognizes the importance of this sector. Having a trained workforce and advancing health sciences will benefit citizens directly but also support the growth of other industries that depend on a productive labor force.

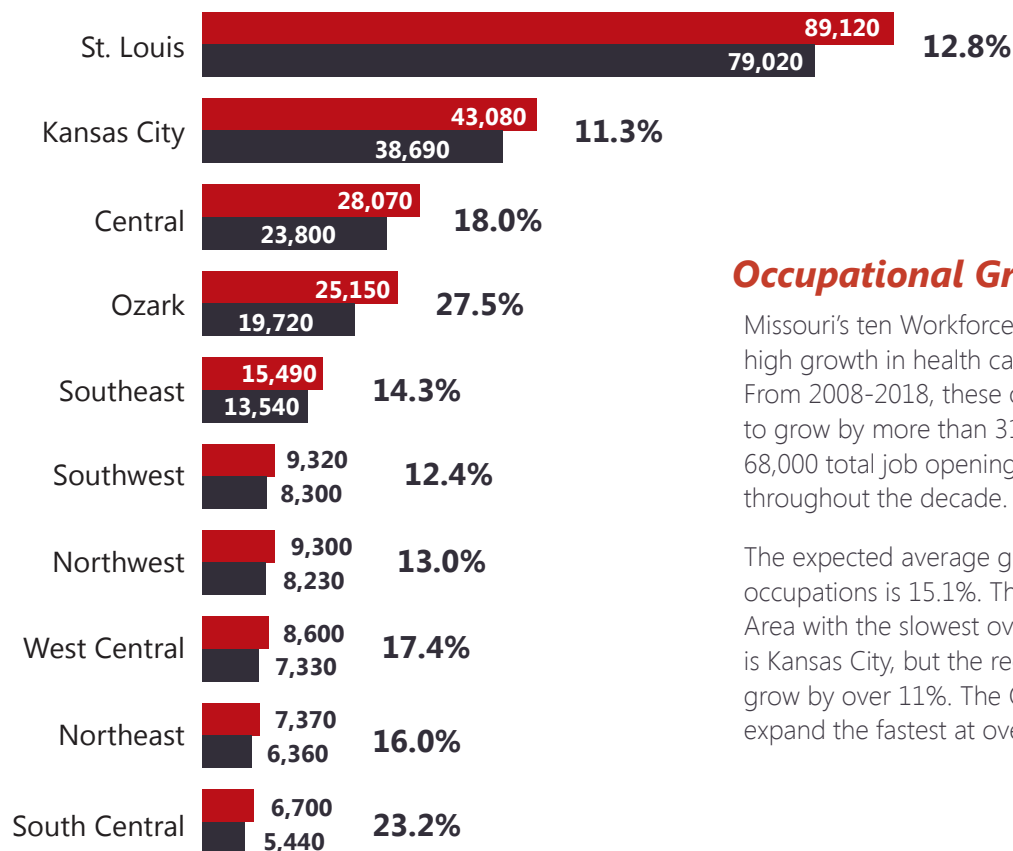
Healthcare and Social Assistance Industry Employment per 1,000 population



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Health Care Occupations Percent Growth: Missouri 2008-2018



■ 2018 Projected Employment
■ 2008 Estimated Employment

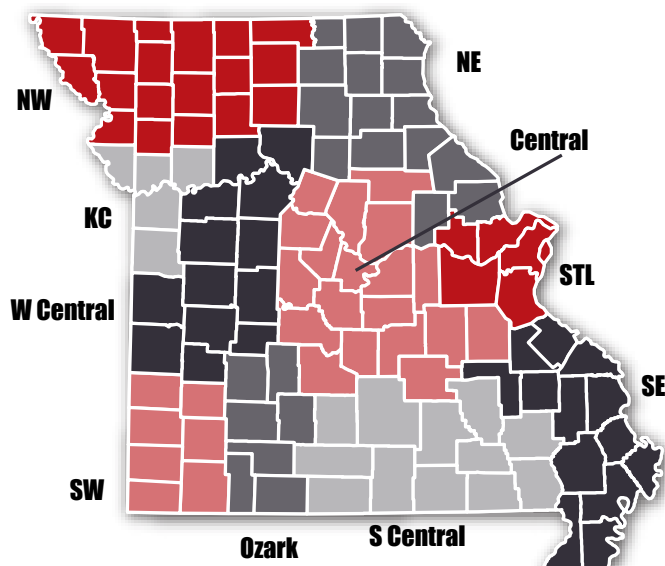
Missouri Long-term 2008-2018 Occupational Projections, MERIC

Occupational Growth

Missouri's ten Workforce Investment Areas consistent high growth in health care-related occupations. From 2008-2018, these occupations are projected to grow by more than 31,700 jobs, with just under 68,000 total job openings (growth and replacement) throughout the decade.

The expected average growth for health care-related occupations is 15.1%. The Workforce Investment Area with the slowest overall health care growth is Kansas City, but the region is still projected to grow by over 11%. The Ozark region is projected to expand the fastest at over 27% growth.

Workforce Investment Areas



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For all ten Workforce Investment Areas in Missouri there are five consistent occupations with the highest number of total job openings from 2008-2018: Registered Nurses, Home Health Aides, Licensed Practical/Vocational Nurses, Nursing Aides, Orderlies, & Attendants, and Pharmacy Technicians. Registered Nurses have the most growth projected in Missouri with the total openings for the ten years over 21,000.

Missouri's Top 5 Occupations with Highest Total Openings:

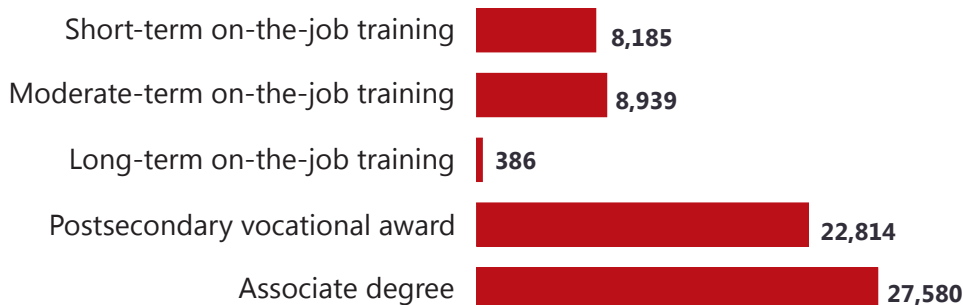
SOC	Occupation Title	2008 Estimated Employment	2018 Projected Employment	Total Openings	Average Wage
29-1111	Registered Nurses	60,770	71,190	21,029	\$56,667
29-2061	Licensed Practical & Vocational Nurses	18,320	20,400	7,815	\$34,178
31-1012	Nursing Aides, Orderlies, & Attendants	39,470	43,310	7,768	\$21,661
31-1011	Home Health Aides	12,960	19,400	7,723	\$19,542
29-2052	Pharmacy Technicians	10,540	13,360	5,476	\$24,564

Missouri Long-term 2008-2018 Occupational Projections, MERIC

Health Care Support Educational & Training Attainment

Many of the fastest growing entry level health care occupations in Missouri typically require 2 years or less of training. By being able to achieve a certification or degree in two years or less, the industry has greater opportunities to fill immediate health care vacancies. It will also offer more opportunities to out-of-work employees to gain new skills quicker and re-enter the workforce.

Health Care Openings for 2008-2018 by Education/Training Attainment



Missouri Long-term 2008-2018 Occupational Projections, MERIC

Middle skill occupations, which typically require two years or less of training but more than just short-term experience, represent just over 43 percent of the state's workforce. Five of the top ten occupations with the most openings through 2018 are in the field of health care; Registered Nurses, Licensed Practical Nurses, Nursing Aides, Pharmacy Technicians, and Medical Secretaries.

Though training for many health care occupations is typically in an academic setting, there is the

possibility of attaining education within health care facilities. Many health care facilities offer career advancement trainings with their current work staff. There are a large number of occupations within health care facilities that are not related to actively participating in patient care. Employees may be able to start working in one of these non-skilled positions and advance to higher paying, more health care intensive occupations after a short period of training.

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2008 Top 25 Employing Occupations in Missouri Hospitals

Registered Nurses	38,008
Nursing Aides, Orderlies, and Attendants	10,718
Medical Secretaries	5,754
Licensed Practical and Licensed Vocational Nurses	4,835
Maids and Housekeeping Cleaners	4,254
Radiologic Technologists and Technicians	3,741
Interviewers, Except Eligibility and Loan	2,776
Medical and Clinical Laboratory Technologists	2,761
Respiratory Therapists	2,435
Office Clerks, General	2,256
Psychiatric Aides	2,225
Medical Records and Health Information Technicians	1,954
Family and General Practitioners	1,904
Emergency Medical Technicians and Paramedics	1,831
Medical and Clinical Laboratory Technicians	1,805
Medical and Health Services Managers	1,505
Pharmacy Technicians	1,395
Medical and Public Health Social Workers	1,389
Secretaries, Except Legal, Medical, and Executive	1,369
Surgical Technologists	1,365
Pharmacists	1,320
Physical Therapists	1,277
Physicians and Surgeons, All Other	1,265
Security Guards	1,223
Food Preparation Workers	1,204

2008 Occupational Employment Statistics-EDS, MERIC

In 2008, nine of the top 25 employing occupations in Missouri's hospitals were not directly health care related. Employees in some health care facilities are able to start as a Medical Secretary at a hospital, and gradually earn enough training to gain employment as a Nursing Aide or Pharmacy Technician. This helps to eliminate many of the constraints facing today's out-of-work employees who do not have the time or resources to enter into a formal advanced education environment. It will also assist in gaining a permanent pipeline of trained health care staff. As one employee progresses into an advanced occupation, a new lower skilled employee may take their place and begin their new training opportunities.

Conclusion

With the current large number of untrained workers in the labor pool, more attention needs to be given to providing them with the skills and knowledge to gain employment in high-demand, target industries throughout Missouri. Health care support occupations have proven growth within their industry, and have more training opportunities than many other growing industries. With the new demands to keep pace with the growing number of patients and stresses upon under-staffed hospitals and clinics, health care facilities must continue to add skilled workers. By providing more training options and attending to the needs of current staff, the health care workforce has the opportunity to nurture and develop new talent that can keep pace with current health care needs.